BRITISH COLUMBIA

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highlights

a weekly digest of recently released British Columbia statistics

The Economy

- **The value of BC product exports was 1.0% lower this August than in the same month last year.** The drop in exports was primarily due to weakness in the forest sector, where international shipments fell 8.1%. At the same time, energy exports were off 2.3%, while shipments of machinery and equipment stalled (-0.2%). However, agriculture and fish exports were 20.3% higher than in August 2001.

  The year-over-year drop in the value of exports was the sixteenth in as many months. Forest and energy products have been the main factors contributing to the downturn. Together, these commodities account for about 60% of the province's exports to the US and overseas.

  Canadian exports edged up 1.2% in August, boosted by a 3.6% increase in Ontario, where strong growth in the auto sector (+11.4%) was more than enough to offset a 13.1% decline in exports of machinery and equipment. International shipments of industrial goods (+8.0%) were also significantly higher than in August 2001. Alberta, where the dominant energy sector has been flagging in the face of lower prices for oil and gas, saw exports decline 7.3% in August. Manitoba (-7.8%) and New Brunswick (-1.8%) also posted declines. *Source: Statistics Canada*

- **Year-to-date, the value of BC exports was down 13.4% from the first eight months of 2001.** Canadian exports fell 6.3% over the same period, as shipments from most provinces were down. BC, Alberta (–27.1%) and Quebec (-3.8%) all posted declines, but Ontario's exports were up 0.4% year-to-date. *Source: Statistics Canada*

- **Shipments of goods manufactured in BC increased 1.4% (seasonally adjusted) between July and August.** BC's three largest manufacturing industries–wood (+8.3%), paper (+2.5%) and food (+0.7%)–all posted gains. Overall, shipments of durable goods were up 1.7%, largely due to the strong showing by wood manufacturers, but also because producers of electrical equipment (+9.4%), machinery (+7.6%) and non-metallic minerals (+2.5%) increased their shipments. However, the computer and electronics industry (-6.1%) continued to falter, and shipments of transportation equipment were off 30.9%. On the non-durables side (+0.9%), a strong showing by paper, food, and beverage & tobacco (+1.0%) manufacturers offset weakness in most other industries.

  Nationally, the value of shipments advanced 0.6% between July and August, with shipments increasing in most provinces. Newfoundland/Labrador (-1.9%) and Quebec (-0.4%) were the only exceptions. *Source: Statistics Canada*

- **Investment in non-residential building construction in the province rose 3.1% (seasonally adjusted) between the second and third quarters.** All three of BC's census metropolitan areas posted healthy increases. Abbotsford, the newest CMA, led the way with a 27.3% gain. Vancouver (+6.8%) and Victoria (+6.6%) saw more modest increases in non-residential building construction. Nationally, investment advanced 3.5% between the second and third quarters, with the strongest gains occurring in Manitoba (+17.5%) and Nova Scotia (+11.7%). PEI (+9.0%) and Ontario (+8.2%) also helped boost the national average.
  Source: Statistics Canada

- **Motor vehicle sales in BC and the territories fell (-5.0%, seasonally adjusted) in August, declining for the first time since March.** BC

Report **How big is BC's public sector?**

Did you know...

Canadians consumed an average of 125 kilograms of fruit last year. They also tucked in to 183 kg of vegetables (including 75 kg of potatoes) and more than 30 kg of oils and fats.

and Saskatchewan (-1.4%) were the only regions where the number of new vehicles driven off car lots fell in August. Nationally, sales were up 4.1%, led by an 11.0% advance in Manitoba. Truck sales roared ahead (+4.8%) as consumers in most parts of the country took advantage of dealer incentives. Sales of trucks–including vans and SUVs–had been weak in the early part of the summer. *Source: Statistics Canada*

- **Restaurant, caterer and tavern receipts in the province edged down 0.3% (seasonally adjusted) between July and August.** Both food services (-0.2%) and drinking (-2.7%) establishments took in less than they had in July. Receipts at drinking places in the province have been weak during most of the last year. Food service sales seesawed up and down at the beginning of the year, but have been trending down since June. Nationally sales dipped 0.1%, largely because receipts at drinking places fell 1.6%. *Source: Statistics Canada & BC STATS*

Tourism

- **Visitor entries to BC from the US and overseas increased 1.5% (seasonally adjusted) between July and August.** Border crossings with the US were kept busy (+2.0%) with more same-day and overnight travellers crossing into Canada from the States. However, entries from overseas sources were down 0.8%, continuing a general decline that began even before the events of September 11th 2001. Entries from Asia, where six out of every ten overseas visitors to BC originate, were off 0.5%. European entries edged up 0.2%, posting the first increase in nine months, while the number of visitors from Australia, New Zealand, and other South Pacific sources rose 0.9% between July and August.

  Canadian travel outside the country was up only modestly (+0.5%) from July. There were 2.9% more Canadians returning from same-day car trips to the US. The number of Canadians returning home via BC from travel abroad fell 1.8% in August. *Source: Statistics Canada & BC STATS*

Aquaculture

- **British Columbia's aquaculture industry sold $293.4 million of farmed finfish and shellfish products in 2001, down from $296.3 million in the previous year.** The decline in sales was largely due to lower prices for farmed salmon, which accounts for the bulk of the industry's production. Finfish sales were down 2.8% overall. However, sales of molluscs rose 38.5%, to $18 million, between 2000 and 2001. Total sales also dipped at the national level, falling to $675.2 million after reaching $692.5 million in the previous year. Most of the finfish and shellfish farming in Canada takes place in BC and New Brunswick. Together, these provinces accounted for 85% of total industry revenues in 2001. *Source: Statistics Canada*

Childhood Obesity

- **Over a third of Canadian children aged 2 to 11 were overweight in 1998/99.** Of these, about half could be considered obese. The proportion of overweight children increased from 34% in 1994/95 to 37% in 1998/99. The proportion of obese children rose from 16% to 18% during the same period. Boys were more likely than girls to be overweight. In 1998/99, an estimated 35% of girls and 38% of boys were overweight. Seventeen percent of the girls, and 19% of the boys, were obese. *Source: SC, The Daily*

Job Stability

- **Eighty percent of Canadian employees stayed with the same employer during 2001.** This compares to 76% in 1980, and 74% in 1989. Job stability was higher among men than women. In 1980, about 78% of men held their jobs for at least one more year, compared to 74% of women. By 2001, the proportion for men had increased slightly to 80%. It rose substantially (to 79%) for women. Men and women with university degrees were more likely to stay in the same job than were those with less education. Job stability rates were 85% for men with a university degree, compared to 77% for those with a high school education or less. Older workers were also more likely to stay put than their younger counterparts. Among men aged 40 to 54, 89% stayed in the same job. This compares to 81% for those aged 25 to 39, and 56% for young workers (aged 15 to 24). *Source: SC, The Daily*

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Oct. 18, 2002 *Infoline Report:* **How Big is British Columbia's Public Sector?**

Contact: Lillian Hallin, (250) 387-0366
Originally published in *Business Indicators*, Seotember 2002. Annual Subscription $60 + GST.

How Big Is British Columbia's Public Sector?

In recent months, much attention has been focussed on the size of BC's public sector. The restructuring of the provincial public sector through early retirements, voluntary departures, and the layoff of some workers has left its mark on the province's public service. It has been argued that BC's public sector has been expanding over time, and that a redefinition of what services should be provided, and by whom, is necessary to keep government expenditures under control.

While many people think of the public sector in terms of employment in government ministries and agencies, the footprint left by the government on the provincial economy is much larger than that. In fact, public sector employment accounts for a very sizeable chunk of the total number of jobs in British Columbia's economy.

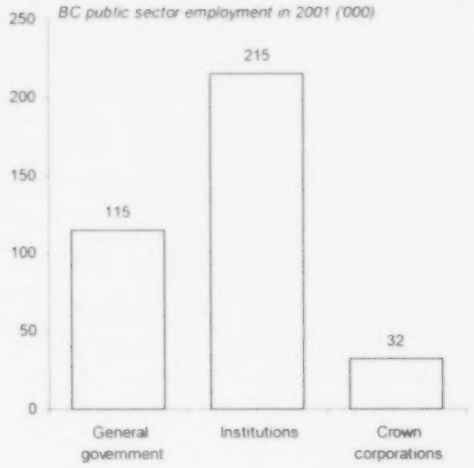
Is the perception that BC's public sector has been burgeoning out of control correct, or do the statistics suggest otherwise? To answer that question, it's necessary to first take a look at how the public sector is defined.

Defining the public sector

Because various governments-and various levels of government-view the public sector differently, it is sometimes hard to get an accurate grasp of just how big the footprint left by the government on the economic landscape really is. Reporting across jurisdictions is not standardized, mainly because provincial governments may choose different ways to deliver services. For example, the activities of a property assessment agency may be included within a provincial ministry or, as is the case in BC, they may the responsibility of a special agency (the BC Assessment Authority). In one case, these activities would show up in the public sector payroll data; in the other, they would be excluded.

To bypass these types of problems, Statistics Canada has developed a definition of the public sector that is based not on how governments see themselves, but on the question of control. Essentially, if an organization is controlled by, or accountable to, government, or if it is largely supported by tax dollars, it is included in the public sector. Many activities are controlled by government even though they are not officially a part of it, so the scope of the public sector is much broader than what may be reported by the various levels of government.

One in three public sector workers is directly employed by a government agency or ministry[1]



What's included in the public sector?

The public sector includes the activities of all three levels of government (federal, provincial and local) that take place within a province. Thus, federal government employees who work in BC are counted in the province's public sector, broadly defined, as are those employed by

[1] The data quoted in this report comes from the Public Institutions Division (PID) of Statistics Canada and the Survey of Employers, Payrolls and Hours. PID produces revenue, expenditure and employment data for the public sector in Canada.

municipal governments and government agencies. In the statistical system, the public sector is split into two groups: government and government business enterprises.

Within the government category, there are two sub-sectors. The core activities of government ministries and agencies are referred to as general government. They include the administrative activities of federal, provincial and local government ministries. Agencies that are under the control of, or primarily funded by, government are also considered part of general government. In BC, this would include agencies such as the Workers' Compensation Board, ICBC, Tourism BC, and BC Assessment Authority, to name just a few. Employees of these agencies are not necessarily counted in government payroll data, but the work that they do is nevertheless under the control of government.

The second sub-sector is government-funded institutions-primarily hospitals, schools, colleges, and universities. Nursing homes and other publicly-run residential care facilities would also be included here. The goal of these organizations is usually not to generate a profit, but to provide a service to the public.

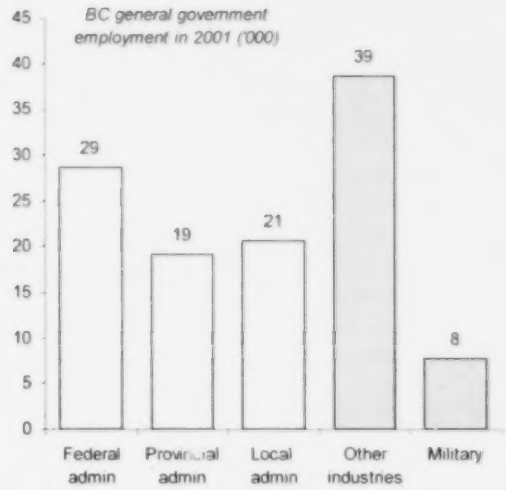
The third component of the public sector is government business enterprises (GBEs), or crown corporations. These are corporations that are owned or controlled by government and operate on a for-profit basis. BC Ferries and BC Hydro are two examples of crown corporations currently operating in this province. Also included in the definition are the Liquor Distribution Branch, the BC Lottery Corporation, BC Rail and various other corporations controlled or supported by federal, provincial or local governments.

The general government sector provides a wide range of services, ranging from transportation and insurance to administration and defence

Employment data from government payroll files and other sources are categorized into a number of industry groups. Only those employees who are directly involved in administrative activities are counted in the public administration industry. This may seem strange, yet when one considers the many different types of activities engaged in by government workers, the reasons for doing this become clearer.

Local governments, for example, offer a variety of services, ranging from day-to-day operations at city hall to providing housing for low-income families and individuals, operating libraries, museums and airports, and providing water, sewage and garbage disposal services. Municipal governments also provide police and fire protection, build roads and bridges, manage parks and operate recreation centres as well as some types of health and social service agencies.

Many general government jobs are in industries other than public administration

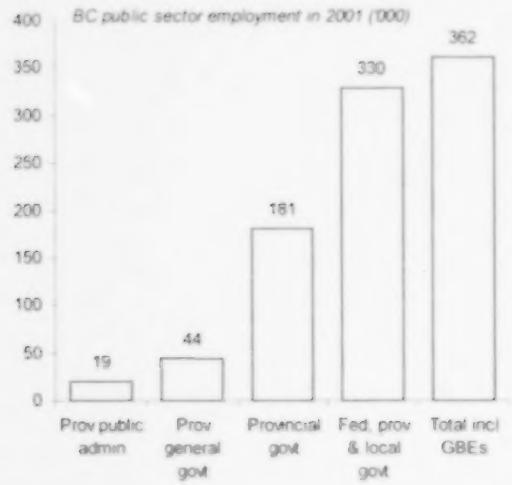


Similarly, at the provincial government level, some employees are engaged in administrative activities, while others work fighting forest fires, planting trees, or doing research. Government agencies such as the Medical Services Commission and Workers' Compensation Board (WCB) provide health and other types of insurance. Workers at provincial jails, parks and recreation sites are also employed by the provincial government. And the list goes on.

The people who provide these services are all on municipal or provincial government payrolls, but in many cases, they work at different loca-

tions and have separate budgets from the administrative staff. Employment in these unique establishments is attributed to the industry that most closely matches the activity in which they are engaged. In the case of the WCB, for example, employment would be attributed to the insurance industry.

How big is the public sector in BC? There are many ways to measure it.



How big is the public sector in BC?

So how big is the public sector? There are a lot of different ways to measure it, and as a result there are many potentially confusing statistics about public sector employment. The narrowest possible definition of government employment-provincial government administration-suggests that there were 19,100 public sector workers in BC in 2001. When other workers employed by the BC government and its agencies (who are not engaged in public administration or defence) are included, the figure is substantially higher, at 44,400. Adding in employees of hospitals, other health care facilities, universities and colleges brings the total up to 181,400. A similar measure for all three levels of government puts the total at 329,900. The broadest definition, which includes everyone who works for federal, provincial and local governments in BC, plus employees of institutions and crown corporations, indicates that BC's public sector had 362,200 employees in 2001. That implies that one in every five of the 1.6 million workers in BC is employed in the public sector. Many others, including workers in the health care sector who are not employed by public institutions (for example, doctors, physiotherapists, and others who work in private offices), also rely on the public purse as a source of income but are not counted in these figures.

The question posed at the beginning of this paper was whether or not the public sector in BC has grown at a disproportionate rate during the last decade or so. The only way to answer that question is to compare recent trends in BC's public sector with those in the rest of Canada.

How does BC stack up, compared to other provinces?

Nationwide, 2.8 million Canadians were employed in the public sector (broadly defined) in 2001, with most of them located in Ontario (977,500) and Quebec (696,100). BC (362,200), the third biggest province, had the third biggest public sector. There were 255,200 public sector workers in Alberta in 2001. Eight out of every ten public sector employees in Canada worked in one of these four provinces.

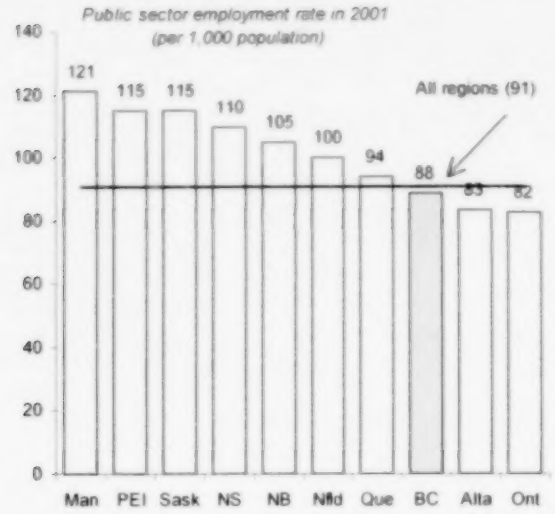
Employment figures on their own are not necessarily a good basis for comparing trends in public sector employment among jurisdictions. This is because the demand for many of the services produced by the public sector (health care, education, protective and social services, to name just a few) is directly related to the size of the population.

In most cases, the provision of these services is highly labour-intensive, so the size of the public sector workforce grows or shrinks with the population. For example, a growing population often means that employment in hospitals and schools must increase in order to provide health care or education services to a larger number of people. Similarly, if there are fewer school-age children in the province, it is likely that employment in schools will drop as the need for teachers, administration, and support staff decreases.

The size of the public sector may also change as a result of policy initiatives or philosophical orientations that cause a government to choose a more, or less, active role in the marketplace.

An example of this may be found in the privatization of the Alberta Liquor Control Board, which moved employees at liquor stores in that province out of the public sector and into private sector employment-pulling down the total public sector job count for that province.

When employment figures are adjusted by population, BC compares favourably with the rest of Canada. Its public sector employment rate is the third lowest in the country...



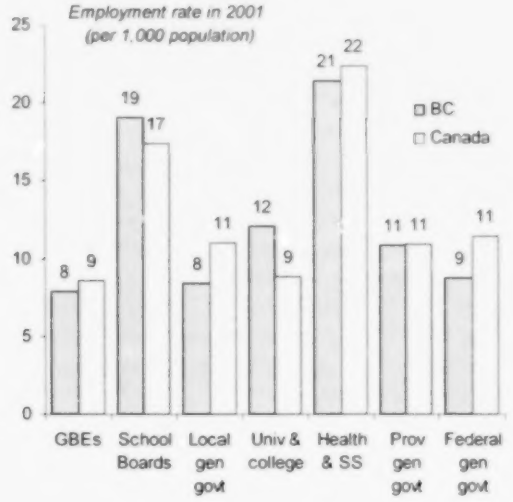
There were 88 public sector employees for every 1,000 residents of BC in 2001

Normalizing public sector employment figures using population makes it possible to measure the extent to which the role of government has changed over time. On this basis, BC had 88 public sector employees for every 1,000 residents of the province in 2001, marginally less than the national average of 91. Ontario (82) and Alberta (83) had the lowest public sector employment rates in the country. The smaller provinces and territories-those least likely to be able to benefit from economies of scale in the provision of public services-had the highest public sector employment rates.

The location of large federal institutions, such as military bases, can have a significant effect on public sector employment figures. Nova Scotia, for example, had 12 military employees for every 1,000 people living in the province-four times the national average of three. Without this concentration of military employees, Nova Scotia's public sector employment rate would have been similar to Newfoundland's, at the middle rather than the higher end of the scale. New Brunswick's military employment rate (7) was also disproportionately high. Rates in other provinces ranged from a low of two in Saskatchewan to four in Manitoba.

With the exception of educational institutions (schools, universities and colleges), British Columbia's public sector tends to be somewhat smaller, compared to its population, than the national average. In particular, the number of people on federal government payrolls (9 for every 1,000 residents) was well below the national average (11) in 2001. School board (19, compared to 17 nationally) and post-secondary institution (12, compared to a national average of 9) employment rates were substantially higher than for the country as a whole.

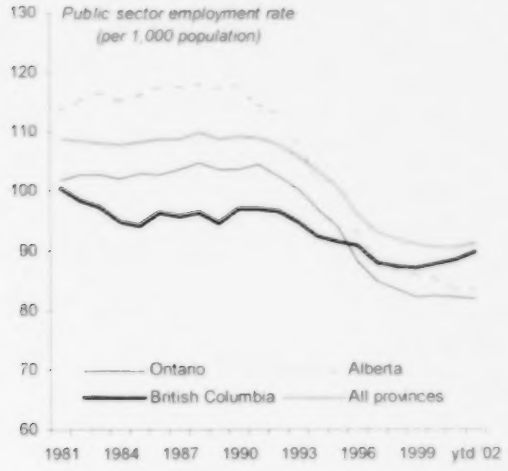
...and at or below the national average in every area except education



Trends in public sector employment since 1981

British Columbia's public sector employment rate has remained below the national average in every year since 1981, and was the lowest in Canada for much of that period. However, the situation has changed, and while the province continues to have one of the lowest public sector employment rates in the country, Ontario and Alberta both have leaner public sectors.

After nearly ten years of decline, the public sector employment rate is rising

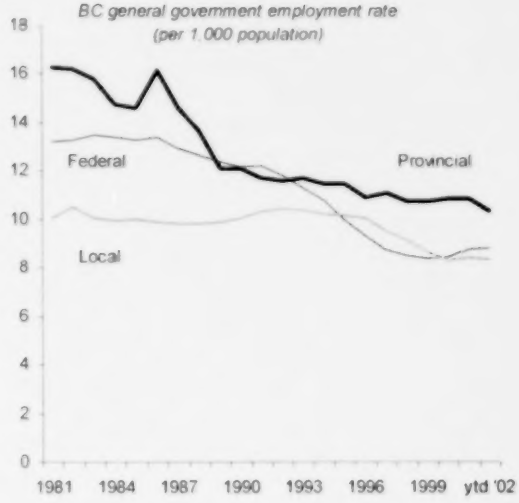


The 1990s were a period of general restructuring in the public sector, and the rolls of public servants were trimmed in most parts of the country. Between 1991 and 2001 the number of public sector workers fell in virtually every province. BC and the territories were the only regions where public sector employment continued to grow, with the number of public sector workers in British Columbia increasing by 35,200 over this period. However, during much of the 1990s, the province had the fastest-growing population in the country, and some of the job growth was in response to a greater demand for services such as health care and education.

British Columbia started the 1990s with a public sector that was, relative to the population, smaller than in any other part of the country. Despite job growth during a period when employment in other parts of the country was shrinking, the province's public sector employment rate dropped from 97 to 88 during the last decade as the population grew even more. By comparison, Alberta's public sector employment rate fell substantially, going from 115 to 83, while Ontario's rate dropped from 105 to 82, over the same period. The average for all provinces went from 109 to 91. There are signs that this trend is coming to an end, however, as the employment rate in all three provinces has begun to rise or at least level off.

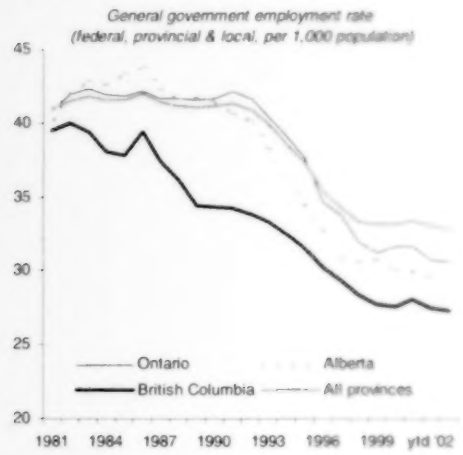
The job situation has not been the same for all levels of government. In BC, the employment rate in the federal government has decreased substantially over the long run, with most of the decline occurring during the last decade. General government employment at the provincial level fell during the 1980s, but was relatively stable throughout the 1990s. Year-to-date figures for 2001 suggest that the effects of the recent restructuring of the provincial government have already begun to push the employment rate down. At the local level, there was stability during the 1980s, but the employment rate fell during the latter half of the 1990s. It now appears to be stabilizing.

In BC, the largest cuts during the last decade have been in federal government employment



Belt-tightening in the general government sector has occurred in all parts of the country. The general government employment rate in BC has fallen by almost a third since 1981, decreasing from 40 to 28-the lowest in the country. Alberta (where the rate went from 40 to 30) Ontario (from 41 to 32) and Nova Scotia (from 60 to 47) were the only other provinces to see similarly large declines. The Canadian rate fell from 41 to 33 during this period.

BC's general government employment rate is the lowest in the country



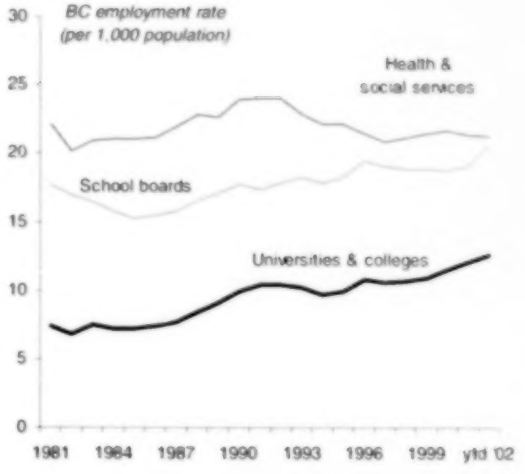
BC's low general government employment rate is largely due to the fact that it has fewer than average federal and local government workers. The employment rate for federal government workers is similar to Alberta's but below the national average; at the local government level, there are fewer workers (relative to the population) than in the other large provinces. BC's provincial general government employment rate is about the same as the national average.

Public sector providers of health care and education have bucked the trend

Health care and educational institutions employ the largest number of public sector workers in BC, with more than 215,000 people on their payrolls. Six out of every ten public sector workers in BC have jobs at health, social service and educational institutions. Health and social service institutions are the largest single employer within the public sector, employing 21 workers for every 1,000 people in the province in 2001-more than the provincial and local general governments combined (19). Municipal school boards (19) had a similarly high employment rate. The employment rate at universities and colleges was significantly lower (12).

The big difference between public sector employment rates in BC relative to the rest of Canada appears to be related to the way in which education and health care services are delivered. While employment rates in most other sectors have been falling, or increasing only moderately during the last decade, the number of jobs in health care and education has grown faster than the population. This is largely because of job growth at educational institutions. The number of public sector health and social service workers in BC has fallen from 22 to 21 per 1,000 population during the last twenty years, and peaked at 24 in the early 1990s. By comparison, the employment rate for school boards rose from 18 to 19 between 1981 and 2001, while the number of jobs at post-secondary institutions rose from 7 to 10 between 1981 and 1991, and increased further to 12 jobs per 1,000 population during the last decade. The rate of job growth in the university and college sector was coincident with increased government spending on post-secondary education in the province.

Employment at universities and colleges has soared



Part of the increase can be attributed to the opening of a new university in the province (the University of Northern BC) in the mid-1990s. However, that factor alone does not explain why employment has been rising. Enrolment at BC colleges and universities has risen more than 60% during the last two decades. This may be partly due to a greater emphasis on getting a post-secondary education, although that trend is not unique to BC. Another factor that may have pushed employment in these institutions up faster than the rate of population increase is low tuition fees, which have drawn students from other provinces to study in BC. The province is also a popular destination for foreign students, particularly from Asian sources, who wish to study in Canada. The extent to which these factors have played a role is unknown, but they have almost certainly had an effect.

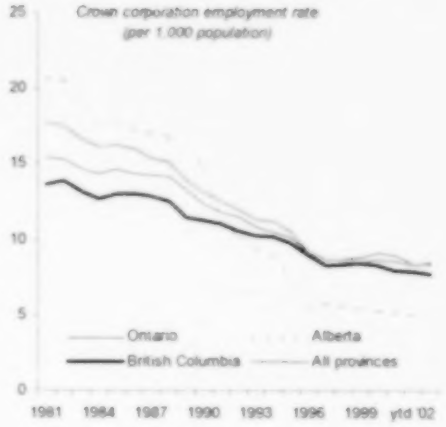
It is possible that the strong employment growth at educational institutions is due to a shift away from full-time to part-time employment at schools and post-secondary institutions. This could result in higher employment counts with little or no increase in person-years of employment. Other possible explanations include factors such as changes in working conditions (e.g., lower student to teacher ratios) and in the mix of volunteer versus paid work at schools and other institutions.

A change in the make-up of the population-for example, if the number of school or university-aged children and young adults in the province had grown more than the general population-could also help explain the rising employment rate at educational institutions. However, when school board and university employment is compared to the population in these age groups, the same trends appear.

Crown corporations are playing a smaller role in the province's economy

Following an overall trend toward less public sector employment, and less government intervention in the marketplace, the number of employees at crown corporations has also been declining in most parts of the country. The decline in BC has been relatively modest (from 14 in 1981 to 8 in 2001), compared to other parts of the country. In Alberta, crown corporation employment dived from a high of 21 per 1,000 people in 1981 to 5 last year. This was largely due to a significant decrease in the number of employees at provincial government crown corporations, as the government in Alberta has been divesting itself of some of its interests in business operations. The federal government has also divested itself of some crown corporations that had headquarters in Alberta.

Employment at crown corporations has been falling



Has the public sector burgeoned during the last decade?

The answer to that question is no. The number of public sector jobs in BC has increased, but not significantly when population growth is taken into account. BC still has one of the leanest public sectors in the country, largely because there are relatively few workers in the local and federal government sectors.

In contrast to other provinces, the provincial government employment rate in BC did not decline during the 1990s, but it also did not increase. It stayed relatively stable, and is currently at the national average, but higher than in Alberta and Ontario. Some components of the public sector, most notably educational institutions, have seen substantial employment growth, and while there are some possible explanations for this trend, it may well deserve further study.

Infoline

October 18, 2002

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BC at a glance . . .

POPULATION (thousands)	Jul 1/02	% change on one year ago
BC	4,141.3	1.0
Canada	31,414.0	1.0
GDP and INCOME		
(BC - at market prices)	2001	% change on one year ago
Gross Domestic Product (GDP) *($ millions)*	130,396	2.2
GDP *($ 1997 millions)*	125,534	0.9
GDP *($ 1997 per Capita)*	30,648	-0.1
Personal Disposable Income *($ 1997 per Capita)*	19,177	0.8
TRADE ($ millions)		
Manufacturing Shipments (seas. adj.) Aug	2,909	3.8
Merchandise Exports (raw) Aug	2,425	-1.0
Retail Sales (seasonally adjusted) Jul	3,345	5.2
CONSUMER PRICE INDEX		% change on
(all items - 1992=100)	Aug '02	one year ago
BC	118.7	2.2
Canada	120.1	2.6
LABOUR FORCE (thousands)		% change on
(seasonally adjusted)	Sep '02	one year ago
Labour Force - BC	2,180	4.1
Employed - BC	2,003	3.8
Unemployed - BC	178	8.0
		Sep '01
Unemployment Rate - BC *(percent)*	8.1	7.8
Unemployment Rate - Canada *(percent)*	7.7	7.2
INTEREST RATES (percent)	Oct 16/02	Oct 17/01
Prime Business Rate	4.50	5.25
Conventional Mortgages - 1 year	5.30	5.15
- 5 year	6.70	7.05
US/CANADA EXCHANGE RATE	Oct 16/02	Oct 17/01
(avg. noon spot rate) Cdn $	1.5840	1.5685
US $ *(reciprocal of the closing rate)*	0.6314	0.6371
AVERAGE WEEKLY WAGE RATE		% change on
(industrial aggregate - dollars)	Sep '02	one year ago
BC	668.84	3.6
Canada	654.18	2.3

SOURCES:

Population, Gross Domestic Product, Trade, Prices, Labour Force, Wage Rate } Statistics Canada

Interest Rates, Exchange Rates: Bank of Canada Weekly Financial Statistics

For latest Weekly Financial Statistics see www.bankofcanada.ca

New on our site

The Profile of the High Technology Sector – 2002 is part of an ongoing project to monitor the growth and evolution of the high technology sector in British Columbia. This publication evaluates the economic contribution of the sector, covering the GDP, revenue, employment, wages, exports, etc. generated by firms in selected high technology industries. The latest edition contains information up to the end of 2001, and is based on the new "NAICS" system of industrial classification.

Input Indicators of the British Columbia High Technology Sector – 2002 (delayed again: coming next week) is the third annual report prepared by BC STATS in conjunction with the Science, Technology and Telecommunications Division to assess conditions that affect the growth of the high technology sector in British Columbia. This report tracks thirty-two business and economic climate indicators for the province, and provides comparisons to other provinces for twenty-eight of them. The indicators cover key aspects of the educational, business, government, external, and labour sectors from the point of view of their impact on high technology firms. The indicators, which might be termed "input" measures, are chosen for their relevance and general acceptance, as well as their availability on an ongoing basis. This is the ideal companion volume to the Profile of the High Technology Sector, providing the background behind the latest economic developments in high technology in the Province.

Released this week by BC STATS

- Immigration Highlights, Second Quarter, 2002
- Earnings & Employment Trends, August 2002

Next week

- Labour Force Statistics, September 2002

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